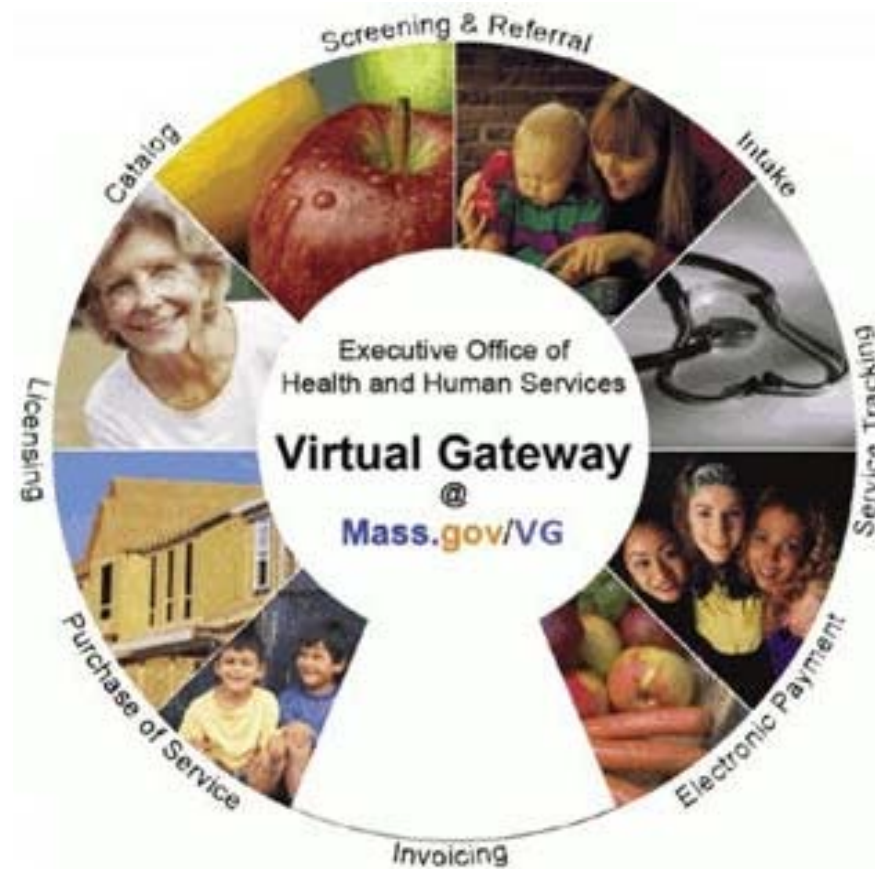# Commonwealth of Massachusetts
Executive Office of Health and Human Services

Virtual Gateway

Enterprise Organization Management
Staff Management Reference Guide

July 2008 Release 4.5, Version 1

Table of Contents

Module 1:   Introduction

Overview   As a Staff Manager, you are responsible for adding, editing, and deactivating staff members in your organization.

Staff members must be entered into your organization database properly so they will appear in the drop down lists of EIM/ESM.

Objectives   In this guide, you will learn how to:

- Log into the Virtual Gateway.

- Troubleshoot to ensure that staff members appear in the organization database.

- Search for a staff Member.

- Add a new staff Member.

- Add Employment to an existing staff member.

- Deactivate a staff member.

Notes:

Module 2: Troubleshooting

Problem:

The staff member does not appear in a drop down list within EIM/ESM.

Solution:

Access the organization and search for the staff member to ensure that they exist in the organization's records. Proceed to Step 1 of *Searching for a Staff Member* in this manual.

Problem:

The staff member does not exist in the Organization database.

Solution:

Access the parent organization and add a new Staff Member. Proceed to Step 1 of *Adding a New Staff Member*.

Problem:

The staff member appears in the parent organization database but cannot be added to the sub-organization.

Solution:

Contact the Agency Contract Manager to ensure that he or she has linked your sub-organization to the contract.

Problem:

The staff member does exist in the Organization database, but does not exist in the drop down list.

Solution:

Access the Staff Member Summary and check the **Effective From** date for the Employment record to ensure that it is at least the first day of the month for which you are trying to bill. Proceed to Step 1 of *Adding an Employment to an Existing Staff Member*.

Problem:

The Staff Member does exist in the Organization database and the Effective From date in the Employment Summary is correct, but the Staff Member still does not appear in the drop down list.

Solution:

Click **Staff Type** from the Employment Summary page and check to see if a Staff Type has been designated and that the Effective From date matches the date of the Employment Summary. Proceed to Step 11 of *Adding a New Staff Member*.

Notes:

Module 3:   Logging into the Virtual Gateway

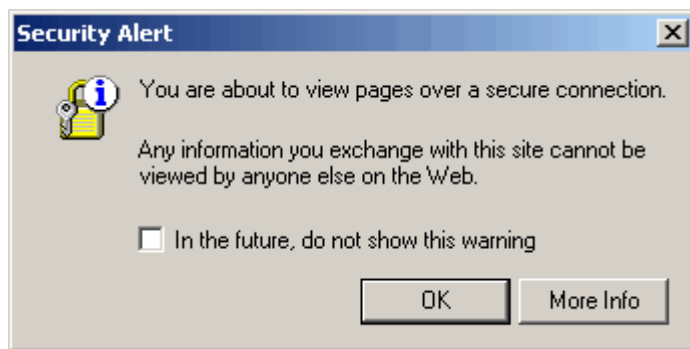Access to EIM/ESM is through Virtual Gateway Provider Services. To Access Provider Services:

1) Open an Internet Explorer session.

2) Type web address **mass.gov/vg** in your browser.

3) Select [Logon to the Virtual Gateway] from **ONLINE SERVICES** box.

Security Alert message appears.

4) Click OK.

Tip: Once you are in the Virtual Gateway, you must use the navigation tools that are part of the application *not* your internet browser's **Back** and **Forward** ( ) buttons.

You are directed to the Virtual Gateway login page.

Note: Security requires that each person have a Virtual Gateway username and password.

The following steps guide you through logging into the Virtual Gateway:

1. Enter your **Username** and **Password**.

    Note: If you are an existing user, enter your current password. If you are a new user, enter the temporary password you received from your new user email.

2. Click the **[Submit]** button. *The **Change Password** page appears*.

    Note: The first time you access the Virtual Gateway under this policy; you will be prompted to change your password. Please read and follow the password requirements on the Change Password page to successfully change your password.

To change your password:

3. Enter and confirm your new password in required fields.

    Click the **[Change Password]** button.

*The **Virtual Gateway Terms and Conditions of Use** page appears.*

4. Read the Terms and Conditions of Use.

5. Click the [**Agree**] button to continue.

    Note: Users are required to agree to the Virtual Gateway Terms and Conditions of Use upon first login.

*The **Authentication Questions** page appears.*

As part of the login process, you must complete all of the security authentication questions that display on this page.

Complete the following steps to submit answers to your security questions:

6. Answer all of the security questions.

7. Click the **[Save]** button to save your responses.

    *The **Business Services** page displays providing you to access your specific business service.*

Notes and tips:

- Any time you change your password or call Virtual Gateway Customer Service with a password question, you will need to answer three of the seven authentication questions as verification. Questions are chosen at random. Answers to security questions are not case sensitive.

- Use passwords you are likely to remember, and be sure to not post it where others can access it.

- If you feel your password has been compromised, change your password.

- If you receive the error message "Invalid User name & Password. Please Try Again," call Virtual Gateway Customer Service for Assistance.

- You cannot reuse the same password.

After your initial login, you can change your password at any time by clicking on the Manage My Profile link.

After logging in the first time, and at regular intervals afterward, users are required to change their password. There are several requirements for your new password:

- The user will be assigned an ID and temporary password sent through e-mail by the Virtual Gateway Customer Service. All users must change their password at first login.

- Must contain between 8 and 16 characters

- The password must contain 1 uppercase character (A,B,C) and 1 lowercase character (a,b,c) with no more than 2 characters repeating in order (i.e. aa is allowed, aaa is not).

- Must contain a number or numbers with no more than 2 characters in sequential order (i.e. 12 is allowed, 123 is not).

- Cannot use the same letter more than 3 times.

- Cannot contain the words "test", "password" or the word "pass", any part of your account ID, your email, your whole first name, your whole last name, or your full name.

- Cannot contain the following special characters: * + , / : ; < = > ' - ? [\ ] |

- Passwords are case-sensitive.

- Users will be automatically logged out of the system after 30 minutes of inactivity.

- EIM/ESM after 15 minutes of inactivity.

Important: You will need to disable any pop-up blocker in your browser to allow the change of password screen to appear. Contact your network administrator if you need assistance with this process.

Periodically, you will be prompted to change your password. As the expiration date for your password approaches, you will receive a message when you login to your account that your password will be expiring soon.

Complete the following steps to change your password before the expiration date:

1. Log into the Gateway. The Business Services page will display.
2. Click **Manage My Profile** link in the **[Account Management]** section on the right hand side of the page.
3. Click **Change Password** tab.
4. Enter and confirm your new password.
5. Click **[Change Password]** button.

Complete the following steps if you forget your password:

1. From the login page, click the Forgot Password? link.
2. Enter your username and click the **[Submit]** button.
3. Verify the answers to the security questions.

   You will be prompted to change you password.

4. Click the **[Login]** button.
5. Enter Password and Confirm Password.
6. Click the **[Change]** button.

If you would like to change other account information for your Virtual Gateway user ID, this can be done from the Account Maintenance page.

Complete the following steps to manage or change your account information:

1. Once logged in to the Gateway on the Business Services page, look for the **[Account Management]** section on the right hand side of the page.
2. Click the Manage My Profile link.
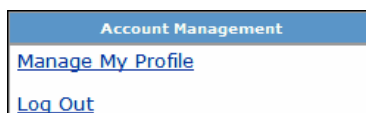
*The **Manage My Profile** page appears.*

3. Select the appropriate tab located at the top of the page to change your account information. Follow all instructions provided.
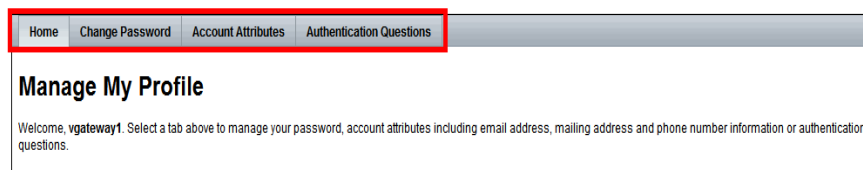
The Virtual Gateway Customer Service is available to assist with:

- General questions regarding the Virtual Gateway

- Technical questions or system issues

- Questions regarding how to use EIM/ESM

- Password resets

Please be prepared to provide the following:

- Name, organization, phone number, email address

- Module/page/field you were working on (if applicable)

- Description of the issue or error message

- Perceived criticality

You can reach the Virtual Gateway Customer Service at 1-(800)-421-0938 from 8:30 a.m. to 5 p.m. Please leave a message if calling after hours.

Module 4:   Searching for a Staff Member

After you log into the Virtual Gateway, the Organization Search page appears. If your organization is a parent organization, you are authorized to perform a search throughout all sub-organizations.

Tip: If your organization is a sub-organization, it is recommended that you search from the parent level or contact the Staff Manager of the parent organization to do so.

1)   Click the **No** radio button next to Government to search for a Non-Government organization.

Tip: When searching for an organization name, it must match the name assigned by the Virtual Gateway.

Tip: You can narrow your search by entering specific search criteria, i.e., full or partial organization name. Use the % sign as a 'wild card' search (entering %ing in the Legal Name *field displays organizations whose names end with 'ing').*

2)   Click   Search   .

The Search Results *appears.*

3) Click the **Parent Organization name** to select it.

The Organization Summary *page appears.*

4) Select **Staff Members** from the navigation bar.

The Staff Member Search *page for the organization appears displaying a list of all active staff members within the parent organization and each sub-organization. If there are no active staff members for the organization, you will receive the message* 'Your search did not return any results. Please add staff member.'

Tip: You can narrow your search for a Staff Member by entering a name or partial name in the Last Name *or* First Name *field.*

5) Click   .

Tip: You can also search for inactive staff members by clicking on the **Inactive** *radio button. The* Staff Member Search *page for the organizations appears displaying a list of inactive staff members.*

If the staff member you wish to add displays, you can reactivate the staff member by clicking on the link to his or her name and following the steps in Adding Employment to an Existing Staff Member *at the end of this guide.*

Notes:

Module 5:   Adding a New Staff Member

You should search for the staff member you want to add to see if they already exist in one or more sub-organizations.

1) Access the Parent Organization.

2) Select **Staff Members** from the navigation bar.

3) Take one of the following actions:

- If the staff member **does exist** within the parent or any sub-organization, you only need to add employment to the existing member. See the *Adding Employment to Existing Staff Members* module.

- If the staff member you are searching for **does not** exist:

    A. Select **SubOrganizations** from the navigation bar.

The list of SubOrganizations displays.

     B. Select the appropriate SubOrganization.

     C. Proceed to Step 2 of *Adding a New Staff Member*.

4) Take one of the following actions:

- If there are no staff members listed in the Search Results, click the **Add Staff Member** link.

- If one or more staff member is listed, click the button.

The Add Staff Member *page appears.*

5) Enter data in the required fields: First Name, Last Name, Date of Birth, and Gender.

Note: Each required field has a red asterisk next to it.

6) Enter a **Social Security Number** in the field *or* click **Unknown** *or* **Refused**.

7) Click .

You are notified that you have successfully added the new staff member's record.

8) Select **Employments** from the navigation bar.

The Employments *page appears.*

9) Click the link for the organization name.

The Employments Summary *page appears.*

10) Enter the date in the **Effective From** field and click .

Note : The Effective From *date defaults to the current date.*

Tip : You should enter a date that is at least *one month prior to the month in which you are billing. If the* Effective From *date is after the first of the month in which you are billing, the staff member will not appear in the drop down list of the Personnel Summary.*

11) Select **Staff Types** from the navigation bar.

The Staff Types *page appears with the following message:*

No Staff Type Information found. Please add staff type

Staff Member #891: Jane Miller

Organization: xyzinc	Effective From: 07/01/2005	Effective To:

No Staff Type Information found. Please add staff type

12) Click the **add staff type** link.

The Add Staff Type *page appears with a list of staff types.*

Add Staff Type

Select	Staff Type Name	Staff Type Description
○	Accounting	Central Accounting Staff
○	Administration	Administration
○	Billing Specialist	
○	Case Manager	
○	Clinician	
○	Contract Manager	Contract Manager
○	Data Entry Specialist	
○	Developmental Specialist	
○	Early Childhood Educator	
○	Enrollment Specialist	

| Display 1 to 10 of 24 | Next Set >> |

13) Click on a radio button to designate a staff type. For example:

⦿	Billing Specialist	

Note: If the desired staff type does not appear in the list, select the closest match.

14) Click **Select Staff Type**.

The Save New Staff Type *page appears.*

15) Enter the date in the **Effective From** field.

Note: The date you enter should match the date you entered on the Employment Summary *page.*

16) Click **Save New Staff Type** .

The Staff Types *page appears showing the* Staff Name Type *and the* Effective From *date that you entered for the new staff member.*

Tip: To add another staff member, you can click on the **Staff Members** *breadcrumb and repeat the process starting with Step 1.*

OrganizationSearch > Organization Summary > Staff Members > Staff Member Summary >

Notes:

Staff Management Reference Guide
Adding a New Staff Member

Module 6:   Adding Employment to an Existing Staff Member

Employment can be added to any existing member of an organization. Adding employment must be done at the organization's parent level. To add employment, access the Staff Member Search page and use the following steps:

1) Access the Parent Organization.

2) Select **Staff Members** from the navigation bar.

3) Click on the **staff member's name** link.

Note: There may be multiple records for a staff member within the parent organization's database.

If a staff member works for multiple sub-organizations, a link will display for each sub-organization for which they are employed. Click on any of the links for the staff member to access their member record.
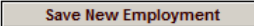
The Update Staff Member *page appears.*

4) Select **Employments** from the navigation bar.

The Employment *page appears.*

5) *Click* **Add New Employment**.

The Add Employment *page appears.*

6) Select the organization to which you are adding the Employment from the Organization drop down list.

Add Employment		
*Organization:	Bobolinkorp ▼	
Position Title:	Select Below	
	zyx inc	
Employment Type:	Bobolinkorp	Primary Contact: ☐
Average Hours Per Week:		
Comments:		
*Effective From:	01/08/2007	Effective To:
		Save New Employment

7) Enter the date in the **Effective From** field on this page.

Note: You should enter a date that is at least the first day of the month in which you are billing to ensure that the staff member will appear in the drop down list of the Personnel Summary for that billing period.

8) Click
Save New Employment
.

9) Add a Staff Type with an **Effective From** date that matches the date you entered in the Employment Summary. To do this, follow the steps starting with Step 11 of *Adding a new Staff Type*.

Module 7:   Deactivating a Staff Member

Staff member records cannot be deleted from the organization database. However, they can be deactivated so that they are no longer active.

Note: When you deactivate a staff member, you are not removing their access to the Virtual Gateway. To remove access to the Virtual Gateway, you must send an updated URF to Virtual Gateway Deployment.

To deactivate a staff member from the records:

1) Log into Enterprise Organization Management and search for the organization.
2) Select **Staff Members** from the navigation bar on the Organization Summary page.

The Staff Member Search *page appears.*

3) Click the name of the staff member you want to deactivate.

The Update Staff Member *page appears.*

4) Select **Employments** from the navigation bar.

The Employments *page appears.*

5) Click link for the organization name.

The Employments Summary *page appears.*

6) Enter the end date for the staff member in the **Effective To** field.

7) Click **Save Changes** .

Note: Once the Effective To *date that you entered has passed, the staff member will not appear in the drop down list of EIM modules from that date forward unless you specifically search for Inactive members.*

The Update Employment *page appears displaying the* Effective To *date and a message indicating that you have successfully updated the record.*

Staff Member #891: Jane Miller

Effective From: 07/01/2005	Effective To: 09/30/2006

Update Employment

You have Successfully Updated the Record.

*Organization:	xyzcorp ▼		
Position Title:			
Employment Type:	Select Below ▼	Primary Contact:	☐
Status:	InActive	Average Hours Per Week:	0.0
Comments:			
*Effective From:	07/01/2005 ▦	Effective To:	09/30/2006 ▦
Date Created:	12/22/2006 12:52:13 PM	Created By:	njohnson
Date Changed:	01/04/2007	Changed By:	njohnson

Save Changes   Delete Employment

*Note: To deactivate another staff member, you can click on the **Staff Members** breadcrumb and repeat Steps 2 through 7.*

OrganizationSearch > Organization Summary > **Staff Members** > Staff Member Summary >

Notes: